



Family Giving Lifecycle Toolkit

Glossary



NATIONAL CENTER FOR
FAMILY PHILANTHROPY



Overview



A brief guide to the key terms and ideas in the Family Giving Lifecycle Toolkit primers, numbered to reference the primer in which the idea is described in more detail.

1. [Philanthropic Purpose](#)
2. [Impact Vehicles and Structures](#)
3. [Governance](#)
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5. [Assessment and Learning](#)
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Glossary

Assessment goals: the four overarching goals for learning and assessment are to inform strategy, monitor results, understand impact, and facilitate improvements. (Primer 5)

Assessment plan: a plan to define and measure the progress and success in three performance areas: internal operations and governance, philanthropic strategy, and partners such as grantees. (Primer 5)

Charitable vehicles: public charities, private foundations, donor-advised funds, intermediaries, and other tax-exempt organizations. (Primer 2)

Context: the data, trends, stories, potential partners, and problem-solving approaches available within your philanthropic priority. (Primer 4)

Continuity: the part of your current philanthropy that you wish to preserve after you stop being involved. Continuity is an ongoing process to manage. (Primer 7)

Donor intent: the intended purpose of a gift or philanthropic vehicle, typically the part of the purpose that is to be preserved. It can be documented in a legal agreement or in a non-binding donor intent statement or legacy recording. (Primers 1, 7)

Evaluation methods: activities and tools used to collect information needed to make decisions in your assessment plan. Three common methods are observation, self-reporting, and research. (Primer 5)

Family culture: who you are as a family—the things that make you feel part of something bigger than yourselves. Family culture is both a product and process. (Primers 3, 6)

Family giving lifecycle: the seven-stage Lifecycle framework encompasses the breadth and inflection points of family philanthropy and orients donors to effectiveness for the purpose of promoting better outcomes.

Giving style: preferences for how you make a difference, including choosing from one of five philanthropic traditions (relief, improvement, reform, engagement, and innovation). (Primer 1)

Governance: the who and how of decision-making in your philanthropy. A governance framework has “4 Ps”: people, principles, policies, and practices. (Primer 3)

Governance stages: three stages of development in a social impact vehicle: controlling founder, collaborative, board-governed/staff managed. (Primer 6)

Impact strategy: directly changing the lives of people or animals or making improvements in communities and ecosystems. (Primer 4)

Impact tools: grants to nonprofits, awards to individuals and businesses such as scholarships and prizes, and impact investments. (Primer 4)

Influence strategy: changing the system—the root causes and underlying conditions that perpetuate a problem. (Primer 4)

Influence tools: activities to change how people think about an issue and their desire and ability to work together toward better results. They include convening, capacity building, strategic communications, nonpartisan advocacy, and lobbying. (Primer 4)

Learning agenda: the means of assessing your social impact strategy, including questions to guide your thinking, activities to answer them, and processes to apply what you've learned. (Primer 5)

Learning culture: a culture of intentional growth, including supporting professional development, continuous improvement mindset, and a safe and equitable environment for questioning. (Primer 5)

Learning strategy: changing knowledge about how to approach problems and implement solutions more effectively. (Primer 4)

Learning tools: activities to improve knowledge and action, including research and data, reporting and media coverage, learning networks, and evaluation capacity building. (Primer 4)

Legacy: what you intentionally accomplish during your lifetime and what you intentionally leave behind. There are five primary levers of legacy: shared values, intent, place, family, and action. (Primer 7)

Leverage strategy: changing the commitments of other individuals' and organizations' resources and the alignment of those resources toward a common goal. (Primer 4)

Leverage tools: activities to attract and leverage resources for social impact, including fundraising, expanding the base, collaboration, responsible purchasing, and corporate social responsibility. (Primer 4)

Lifespan: how long you wish your social impact vehicle or philanthropic resources to last. There are three primary options: giving while living, limited lifespan, and perpetuity. (Primers 3, 7)

Market-based vehicles: ways to connect profit and purpose, including corporate social responsibility programs, mission-driven businesses, and impact investing funds. (Primer 2)

Mission statement: defines the purpose of your philanthropy—what you hope to accomplish in the present to bring about your vision for the future. It answers, “How will we work and give toward that better world?” (Primer 1)

Motivations: specific impulses or reasons you act in a certain way. They’re the inspiration and rationale behind why you give—the purpose and the aim, the core of why you commit to philanthropy. (Primer 1)

Operations functions: the tasks you need to accomplish in your philanthropic work, including administrative, compliance, board management, grant-making and other strategies, and family stewardship. (Primer 6)

Organizational culture: ways of working together toward common goals that have been followed so frequently that people don’t even think about trying to do things another way. Culture is both a product and process. (Primer 6)

Partners: the organizations, informal groups, and individuals who receive your resources or take part in your activities (e.g. grantees, scholarship awardees, members of a collaborative you facilitate). (Primer 4)

Pathways: four paths to take to target your resources for social impact—charitable, market-based, public policy, and peer-based). (Primer 2)

Peer-based vehicles: vehicles that collaboratively mobilize other people and their resources, including crowdfunding platforms, giving circles, mutual aid networks, and social movements. (Primer 2)

People: who you involve in your philanthropy. They can include family members, trusted allies, community voices, experts, and people with lived experiences or excluded perspectives. (Primer 3)

Performance areas: three areas of your philanthropy to assess—internal operations and governance, philanthropic strategy, and partners such as grantees. (Primer 5)

Philanthropic advisors and consultants: individuals and firms paid to help donors and their social impact vehicles navigate the how, what, and why of giving and improving results. (Primer 6)

Philanthropic continuity plan: a written governance document with four components—legacy, lifespan, transition management, and dissolution. (Primer 7)

Philanthropy: “voluntary action for the public good.” It can be informal and/or formal and include giving, granting, volunteering, investing for social/environmental impact, building social enterprises, advocacy, and/or other actions. Family philanthropy is when multiple branches and/or generations of a family (self-defined) take those actions together.

Policies: rules, guidelines, and parameters for using your principles to tackle common issues. (Primer 3)

Power: decision-making authority and how it is shared. (Primer 3)

Practices: established governance, operating, and administrative procedures designed to fulfill stated objectives or parameters in your policies. (Primer 3)

Principles: your moral compass, the rules or beliefs that help you know what is right and wrong and govern your behavior. They guide your philanthropic purpose, governance, strategy, assessment plan, and more. (Primers 1, 3, 5)

Priorities: preferences for populations, places, problems, or issues in which you most want to make a difference. (Primer 1)

Process: how you implement a policy or practice. The four-step process in a philanthropic strategy is pipeline building, screening, decision-making, and implementation. (Primer 4)

Public policy vehicles: organizations that can lobby, including 501(c)(4) nonprofits and 527 political organizations such as Political Action Committees. (Primer 2)

Resilience: your family's ability to bounce back to healthy functioning after stress and even turn that stress into a catalyst for personal growth. (Primer 3)

Resources: the “5 Ts” of time, talent, ties, testimony, and treasure you can dedicate to your philanthropy. (Primer 2)

Results: the impact of your philanthropy, assessed through four performance measures—how much was done (outputs), how well it was done (quality), how much change (outcomes), and long-term impact. (Primer 5)

Roles: the ways you involve other people (e.g., board of directors, investment committee, or community advisory board). (Primer 3) Also, how you believe you and your resources might be most helpful and effective to making a difference in your philanthropic priority. (Primer 4)

Social impact: the intentional net benefit to the public of your actions. (Primer 2)

Social impact toolkit: programs and activities to deploy resources in a philanthropic strategy. There types of tools are in an I2L2 framework—impact, influence, leverage, and learning. (Primer 4)

Social impact vehicles: structures to use private resources for public benefit or to improve the well-being of others. There are four types—charitable, market-based, public policy, and peer-based. (Primer 2)

Strategic approaches: how you or others solve a problem. The approaches are in the four-part I2L2 framework—impact, influence, leverage, and learning. (Primer 4)

Strategy: your roadmap for achieving social impact with your resources, vehicles, and tools. It has five parts—goals and aspirations, context, your role, processes, and assessment. (Primer 4)

Succession: when and how some things must change for a transition to succeed. Succession is an event with a defined beginning and end. (Primer 7)

Transparency: how open and accessible your philanthropic purpose, processes, and decisions will be to others. You can choose on a range from anonymous to public advocate. (Primer 3)

Values: the characteristics and behaviors that are important in your life, ideas that are fundamental to your character and decision-making. (Primer 1)

Vision statement: describes your aspirations—the future you hope to see. It answers, “What would a better world look like?” (Primer 1)

About the National Center for Family Philanthropy

NCFP is a network of philanthropic families committed to a world that is vibrant, equitable, and resilient. We share proven practices, work through common challenges, and learn together to strengthen our ability to effect meaningful change. Our range of programs and services support family philanthropy at its many points of inflection and help families embrace proven practices and advance momentum. Explore our resources, all rooted in a [Family Giving Lifecycle](#) by visiting www.ncfp.org.